

Message Text

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ACTION AGR-08

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O R 191105Z JUN 75

FM AMEMBASSY BRASILIA

TO AMEMBASSY CARACAS IMMEDIATE

INFO SECSTATE WASHDC 9883

AMCONSUL RIO DE JANEIRO

AMCONSUL SAO PAULO

C O N F I D E N T I A L SECTION 1 OF 3 BRASILIA 4951

E.O.11652: GDS

TAGS: OVIP (BUTZ), EAGR, BR

SUBJECT: VISIT BY SECRETARY BUTZ: ISSUES

CARACAS PASS SECRETARY BUTZ

1. FOLLOWING ARE BRIFING POINTS ON PRINCIPAL ISSUES AND TOPICS THAT EMBASSY EXPECTS WILL ARISE DURING SECRETARY BUTZ'S DISCUSSION WITH GOB OFFICIALS IN BRAZIL.

BRAZILIAN AGRICULTURAL DEVELOPMENT

2. SINCE 1968 THE BRAZILIAN ECONOMY HAS BEEN MARKED BY A RAPID RATE OF INDUSTRIAL EXPANSION AND, UNTIL RECENTLY, A LARGELY LAGGING AGRICULTURAL SECTOR. THE BIGGEST SUCCESS HAS BEEN SOYBEANS, WHILE SIZABLE GAINS HAVE BEEN MADE IN WHEAT PRODUCTION. IN 1974 SUGAR WAS LARGEST SINGLE EXPORT PRODUCT, AHEAD OF COFFEE FOR THE FIRST TIME SINCE THE 19TH CENTURY.

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3. THE GEISEL GOVERNMENT CAME INTO OFFICE IN MARCH 1974, FOLLOWING AN INTENSE PERIOD OF RIVALRY BETWEEN THE MINISTRIES OF AGRICULTURE AND FINANCO OVER AGRICULTURAL POLICIES THAT RESULTED IN THE RESIGNATION OF ONE AGRICULTURE MINISTER (CIRNE LIMA) AND CONTRIBUTED TO SEVERE DISRUPTION IN DOMESTIC SUPPLY OF ESSENTIAL FOOD PRODUCTS, PARTICULARLY BEEF, BEANS, AND VEGETABLE OILS. (NOTE: ANY CRITICISM OF THE FORMER MEDICI GOVERNMENT OR COMPARISONS OF THE GEISEL POLICIES AND THE POLICIES OF THE MEDICI GOVERNMENT ARE POLITICALLY VERY SENSITIVE AND ARE TO BE AVOIDED.)

4. UNDER GEISEL, THE AGRICULTURE MINISTRY'S RESPONSIBILITY FOR AGRICULTURAL DEVELOPMENT AND FOOD SUPPLY HAS BEEN STRENGTHENED. PAULINELLI HAS SOUGHT TO EXPAND THE GOVERNMENT'S POLICY TOOLS BEYOND THE SUPPORT PRICES AND SUBSIDIZED FARM CREDIT RELIED UPON IN THE PAST, AND TO CORRECT THE UNSTABLE PRICE AND EXPORT POLICIES THAT HAD GENERATED PRODUCER UNCERTAINTY AND CONSIDERABLE GOVERNMENT-FARMER FRICTION. HE HAS NOT YET, HOWEVER, STRENGTHENED HIS MINISTRY SUFFICIENTLY IN TERMS OF MACRO-POLICY PLANNING AND IMPLEMENTATION. PRIORITY OBJECTIVES OF THE GOB IN AGRICULTURE ARE IMPROVED DELIVERY OF FERTILIZERS AND CONTINUED STIMULATION OF NATIONAL PRODUCTION, ASSURED SUPPLY OF DOMESTIC STAPLES AT "REASONABLE PRICES" (MEANING RELIANCE ON MARKET PRICES BUT WITH CLOSE GOVERNMENT MONITORING), DIRECT INVESTMENT IN RAIL, HIGHWAY, AND PORT FACILITIES, GENEROUS CREDIT AND FISCAL INCENTIVES TO STIMULATE INVESTMENT IN STORAGE FACILITIES ESSENTIAL TO EXPAND AND IMPROVE THE OUTFLOW OF AGRICULTURAL EXPORTS, REDUCTION OF WHAT IMPORT REQUIREMENTS, AND STIMULATION OF DOMESTIC RESEARCH AND CREATION OF A FARM TECHNOLOGY TAILORED TO BRAZIL'S NEEDS. ONE OF THE GOVERNMENT'S BIGGEST TECHNOLOGICAL AND PSYCHOLOGICAL CHALLENGES IS THE NEED TO STIMULATE LAND DEVELOPMENT AND INVESTMENT IN FARM CAPITAL TO RAISE PRODUCTIVITY. OUTSIDE OF AREAS, SUCH AS THE STATES OF SAO PAULO, PARANA AND RIO GRANDE DO SUL, LARGE SEGMENTS OF BRAZILIAN AGRICULTURE ARE ENGAGED IN TRADITION-BOUND, EXTENSIVE, LOW CAPITAL, AND LABOR INTENSIVE FARMING PRACTICES.

PRINCIPAL COMMODITIES

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5. SOYA - SOYBEAN PRODUCTION HAS BEEN THE SUCCESS STORY OF RECENT YEARS, WITH OUTPUT GOING FROM UNDER 3 MILLION METRIC TONS IN 1972 TO 10 MILLION TONS THIS YEAR, WITH PLANNED EXPORTS FOR ABOUT 3.8 MILLION TONS OF BEANS AND 2.9 MILLION TONS OF MEAL. IN 1973, SOY EXPORTS HELPED OFFSET THE COST OF LARGE WHEAT IMPORTS AND LAST YEAR THEY COMPENSATED TO A LARGE DEGREE FOR THE DISAPPOINTING COFFEE EARNINGS. GOB HOPES TO ENCOURAGE

ENOUGH EXPANSION OF STORAGE, LARGELY BY COOPERATIVES, TO
ENABLE THEM TO AVOID FORCED SALES AT DEPRESSED PRICES AND TO BE
ABLE TO TAKE ADVANTAGE OF THE FUTURE MARKET. THE GOB ALSO
HOPES TO DIVERSIFY SOY EXPORTS BY INCREASING CAKE AND OIL
PRODUCTION. DOMESTIC CONSUMPTION OF SOY PRODUCTS, EXCEPT
FOR OIL, REMAINS LOW AND THERE HAS BEEN LITTLE GOVERNMENT OR
PRIVATE ACTIVITY TO RAISE IT. THE PRIMARY SOY AREAS ARE
RIO GRANDE DO SUL, PARANA, AND SAO PAULO AND EXPANSION IS
BEGINNING TO TAKE PLACE IN MINAS GERAIS AND MATO GROSSO.

6. COFFEE - OUTPUT THIS YEAR WILL BE AROUND 24 MILLION BAGS,
BELOW LAST YEAR'S PRODUCTION OF 27.3 MILLION BAGS BUT HIGHER
THAN THE AVERAGE OUTPUT OVER THE PAST 5 YEARS, WHICH WAS
REDUCED BY A SEVERE FROST IN 1969 AND 1972. WITH DOMESTIC
CONSUMPTION OF JUST OVER 9 MILLION BAGS PER YEAR AND HOPED-
FOR EXPORTS OF 18 MILLION, STOCKS (MOST RECENTLY ESTIMATED AT
11.6 MILLION BAGS) WILL REMAIN STATIC OR FALL
SLIGHTLY BEFORE PRODUCTION STABILIZES AT ABOUT 30 MILLION
BAGS AS A RESULT OF THE CONTINUING GOVERNMENT FINANCED
PLANTING PROGRAM, WHICH WAS BEGUN IN 1970.

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FM AMEMBASSY BRASILIA

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INFO SECSTATE WASHDC 9884

AMCONSUL RIO DE JANEIRO

AMCONSUL SAO PAULO

C O N F I D E N T I A L SECTION 2 OF 3 BRASILIA 4951

7. THE FAILURE OF EFFORTS TO ORGANIZE EFFECTIVE COOPERATION AMONG COFFEE PRODUCING COUNTRIES HAS RECENTLY RESULTED IN AGGRESSIVE SALES POLICIES BY THE GOVERNMENT'S COFFEE INSTITUTE, IBC, AND RENEWED INTEREST IN THE NEGOTIATION OF A NEW ICA. THE US PROPOSAL HAS BEEN DESCRIBED BY SOME GOB OFFICIALS AS TOUGHER THAN EXPECTED. THEY DO NOT LIKE THE PROVISION UNDER WHICH QUOTAS WOULD BE SET ANNUALLY -- ALTHOUGH THEY LIKE THE MARKET SHARE FORMULA -- AND THE IMPOSITION OF PENALTIES FOR SHORTFALLS. GOB OFFICIALS FEEL THE US PROPOSAL, ASIDE FROM THE CONCEPT ON STOCKS AND RELATED MARKET SHARING FORMULA, REPRESENTS A "MINIMAL" AGREEMENT RATHER THAN THE TIGHT, STRONG AGREEMENT THEY SOUGHT IN ORDER TO STABILIZE COFFEE PRICES AT A RELATIVELY HIGH LEVEL TO BOOST EXPORT EARNINGS. THEY RECOGNIZE, HOWEVER, THAT FORCES ARE AGAINST THE PRODUCERS AND THAT DIFFERENCES AMONG THE PRODUCERS THEMSELVES WEAKEN THEIR POSITION IN FAVOR OF A "TIGHT AGREEMENT". IF THIS SUBJECT COMES UP, BRAZILIAN OFFICIALS WILL BE LOOKING FOR AREAS OF FLEXIBILITY IN THE US POSITION, DIFFERENCES BETWEEN SECRETARY BUTZ'S VIEWS AND CONFIDENTIAL

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TH STATE DEPARTMENT'S, AND FOR AN INDICATION OF CONGRESSIONAL ATTITUDES. BRAZIL WOULD LIKE SOME FORM OF "INDEXING" IN A COFFEE AGREEMENT BUT RECOGNIZE STRONG CONSUMER OPPOSITION.

8. SUGAR - AS WITH COFFEE, SUGAR MARKETING AND PRODUCTION IS CONTROLLED BY AN AUTONOMOUS AGENCY (THE SUGAR AND ALCOHOL INSTITUTE), NOMINALLY UNDER THE AUTHORITY OF THE MINISTER OF INDUSTRY AND COMMERCE. HIGH WORLD PRICES LAST YEAR AND EARLY THIS YEAR CUSHIONED THE PSYCHOLOGICAL IMPACT OF THE EXPIRATION OF THE US SUGAR ACT, AND WHILE THE US MARKET REMAINS OF GREAT IMPORTANCE TO THE IAA, THERE IS INCREASED AWARENESS OF A NEED TO ESTABLISH DIVERSIFIED PERMANENT MARKETS. SUGAR HAS BEEN AN IMPORTANT ELEMENT IN GOB TRADE NEGOTIATIONS WITH ARAB OIL PRODUCERS.

9. 1974 SUGAR PRODUCTION WAS 6.9 MILLION METRIC TONS, WITH 3.4 MILLION FOR EXPORT. 1975 PRODUCTION IS FORECAST AT 7.7 MILLION TONS WITH 3.3 MILLION OFFICIALLY TAGGED FOR EXPORT. SUGAR AND SUGAR EXPORTS THIS YEAR ARE FORCAST TO REACH \$1.4 MILLION. IN 1974, BRAZIL EXPORTED 699 THOUSAND TONS OF RAW SUGAR TO THE US (\$400.8 MILLION) WHILE THIS YEAR THE IAA HAS REPORTED NO SHIPMENTS TO THE US THUS FAR.

10. BRAZIL HAS EXERTED A MODERATING INFLUENCE IN MEETINGS OF LATIN-AMERICAN SUGAR PRODUCERS AND HAS EMPHASIZED THE NECESSITY FOR PRODUCER-CONSUMER COOPERATION. THE BRAZILIANS WILL BE INTERESTED IN AN EXCHANGE OF VIEWS ON WORLD SUGAR PRICE MOVEMENTS, PROSPECTS FOR A NEW US SUGAR

ACT, AND USG ATTITUDES TOWARDS NEGOTIATION OF AN IBA.
ALSO, THE EMBASSY HAS RECEIVED INFORMATION THAT THE IAA IS
VERY ANXIOUS TO SIGN LONG-TERM (3 TO 4 YEARS) CONTRACTS WITH
THE US, AND WE UNDERSTAND THEY ARE INTERESTED IN SOME FORM OF
GOVERNMENT-TO-GOVERNMENT AGREEMENT.

11. COCOA - THE COCOA COMMISSION, CEPLAC, IS UNDER THE AGRICULTURE
MINISTRY BUT OPERATES AUTONOMOUSLY AND HAS DIRECT
FUNGING EARMARKED FROM COCOA AND COCOA PRODUCT EXPORT SHIPMENTS.
FAVORABLE WORLD MARKET CONDITIONS HAVE STIMULATED EXPANSION OF
OUTPUT AND IMPROVED PRODUCTIVITY AND INVESTMENT IN PROCESSING
PLANTS. THE GOB HAS NOT INDICATED ITS ATTITUDE TOWARD RENEGOTIATION
OF THE COCOA AGREEMENT BUT BRAZIL WILL PROBABLY SEEK A LARGER
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SHARE VIS-A-VIS GHANA AND NIGERIA. THE GOB WILL PROBABLY
BE INTERESTED IN DISCUSSING THE ANNOUNCED USG INTENTION TO
PARTICIPATE IN THE NEGOTIATIONS FOR A NEW AGREEMNT.

12. WHEAT - SELF SUFFICIENCY IN WHEAT IS A LONG-FRUSTATED
BRAZILIAN ASPIRATION THAT THE GEISEL GOVERNMENT HAS MADE
ONE OF ITS MAIN GOALS. INCREASED AREA AND FAVORABLE WEATHER
THIS CROP YEAR RESULTED IN A 2.8 MILLION TON CROP, ABOUT
900,000 METRIC TONS OVER THE 1973/74 CROP. IMPORTS FOR CY
1975 WILL BE ABOUT 1.9 MILLION METRIC TONS, ABOUT 900,000
METRIC TONS BELOW CY 174 IMPORTS. THUS WILL PROBABLY BE
THE SOURCE FOR THE BULK OF THE IMPORTS THIS YEAR, CONTRARY
TO 1974 WHEN CANADA SUPPLIED THE BULK OF THE IMPORTS. INTRODUCTION
OF SOYBEANS, DOUBLE CROPPED WITH WHEAT, HAS IMPROVED
THE FIANCIAL STABILITY OF GROWERS. A NEW FERTILIZER SUBSIDY
PROGRAM OFF-SETTING 40 PERCENT OF THE COST ALONG WITH A
SUBSTANTIAL INCREASE IN PRICE TO \$211 PER METRIC TON, COULD
RESULT IN A PRODUCTION INCREASE OF 1 MILLION TONS IN THE
1975/76 SEASON. (FERTILIZER SUBSIDY PROGRAM COFERS A BROAD RANGE
OF CROPS, IN ADDITION TO WHEAT) UNDER A 1973 AGREEMENT, CANADA
HAS A CONTRACT FOR DELIVERY OF 400,000 METRIC TONS IN EITHER CY 1975
OR 1976. WITH THE CANADIAN PRICES HIGH, BRAZIL WILL LIKELY DEFER
PART OF THAT AMOUNT FOR 1976 DELIVERY.

13. CORN - BRAZIL IS A LARGE CORN PRODUCER - 15 MILLION
METRIC TONS IN 1974 AND 16 MILLION THIS YEAR, BUT MUCH OF THE
PRODUCTION IS SMALL SCALE, HAND PLANTED AND HAND HARVESTED
PRODUCTION, USED ON-FARM, FOR HUMAN CONSUMPTION. ABOUT 20
PERCENT OF THE PCODUCTION GOES INTO MIXED FEEDS, PRIMARILY
POULTRY, BUT ALSO DIARY. RELATIVELY LITTLE CORN IS CONSUMED FOR
PROCESSING INTO STARCH, OIL OR ALCOHOL. EXPORT
HAS BEEN STRICTLY CONTROLLED BY THE GOVERNMENT LICENSING
SYSTEM WHICH IS MANAGED BY CACEX, A BRANCH OF BANK OF BRASIL.
THE LICENSES GRANTED ARE DIRECTLY DEPENDENT ON THE VOLUME OF
CARRY-OVER AND AS A RESULT, EXPORTS ARE ERRATIC - 1.3 MILLION TONS

IN 1974 VERSUS 43,000 TONS IN 1973.

EXPORT - COMMODITY TRADING

14. BRAZIL IS A MAJOR LEAGUE PRODUCER OF SEVERAL COMMODITIES
BUT A NEOPHYTE IN COMMODITY MARKET TRADING. THE HISTORIC
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SOLUTION OF STATE-TRADING IN COFFEE AND SUGAR IS NOT BEING
APPLIED TO SOYBEANS (ALTHOUGH THERE HAS BEEN SOME PUBLIC DISCUSSION
OF THE MATTER), AND THE GOB IS SEEKING TO ENCOURAGE COOPERATIVES
AND NATIONAL TRADING COMPANIES TO ACQUIRE
COMPETENCE IN FUTURES TRADING AND HEDGING. FOR OTHER
SECONDARY BUT IMPORTANT EXPORT COMMODITIES, SUCH AS MEAT,
SISAL, CASTOR OIL, AND FROZEN ORANGE CONCENTRATE, THE GOVERNMENT
HAS ATTEMPTED TO MAXIMIZE EARNINGS BY ESTABLISHING
MINIMUM EXPORT PRICES AND QUOTAS ON EXPORTS AND BY WITHHOLDING
EXPORT LICENSES WHEN MARKET PRICES WERE THOUGHT TO BE TOO
LOW. IN GENERAL, GOB EFFORTS TO TIMULATE AGRICULTURAL
EXPORTS HAVE BEEN CONFINED MAINLY TO GRANTING INCREASED
EXPORT QUOTAS.

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INFO SECSTATE WASHDC 9885
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15. PRESS AND CONGRESSIONAL CRITICISM OF FOREIGN TRADING COMPANIES DOES NOT REFLECT THE VIEWS OF MOST INFORMED GOVERNMENT LEADERS, WHO RECOGNIZE THE NEED FOR BOTH THE CAPITAL AND THE EXPERTISE OF MULTINATIONALS.

TECHNOLOGY

16. THE GEISEL GOVERNMENT IS DEVOTING MUCH ATTENTION AND A LARGE VOLUME OF RESOURCES TO AGRICULTURAL RESEARCH. THE AIM IS TO DEVELOP AND DISSEMINATE A TECHNOLOGICAL BASE SUITED TO THE COUNTRY'S VARIED LAND AND CLIMATIC CONDITIONS. PAST US-BRASILIAN COOPERATION IN AGRICULTURAL RESEARCH, PARTICULARLY THROUGH AID, PROVIDES A STRONG BASE FOR FURTHER COLLABORATION. PAULINELLI WOULD PROBABLY BE RECEPTIVE TO AN OFFER BY SECRETARY BUTZ FOR NEW JOINT RESEARCH COOPERATION. (NOTE: THE AID MISSION WILL BE PHASED OUT BY JUNE 1977 AND AID FINANCING IS THEREFORE NOT AVAILABLE.)

MULTILATERAL TRADE NEGOTIATIONS
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17. ON AGRICULTURAL TRADE GOB SEES THE US AND EC AS THE MAIN PLAYERS IN THE MTN AND THEY LOOK TO SHARE ANY CONCESSIONS OBTAINED FOR IMPROVED ACCESS TO EUROPEAN MARKETS. US SUPPORT FOR LIBERALIZATION OF TRADE IN TROPICAL PRODUCTS IS OF DIRECT BENEFIT TO BRAZIL. THE GOB HAS STRONG INTEREST IN MTN CONCESSIONS FOR EXPORT OF CITRUS FRUIT AND JUICES. SECRETARY BUTZ SHOULD REVIEW US STRATEGY IN MTN ON AGRICULTURAL TRADE AND ENCOURAGE SUPPORTIVE EFFORTS BY GOB.

WORLD FOOD PROBLEMS

18. GOB WILL BE ANXIOUS TO HEAR DETAILS OF USG POSITION ON COMMODITY ARRANGEMENTS. THEY MAY RAISE QUESTIONS REGARDING LIKELY PRICING MECHANISMS UNDER SUCH ARRANGEMENTS, FOR EXAMPLE - WOULD LOW COST DEVELOPED COUNTRY PRODUCERS ACCEPT PRODUCTION OR EXPORT LIMITS IN ORDER TO ASSURE THAT LESS EFFICIENT LDC PRODUCERS CAN MAINTAIN A SHARE OF MARKET.

19. ON GRAIN RESERVES, PAULINELLI WILL PROBABLY RAISE THE PROPOSAL HE MADE AT ROME CONFERENCE FOR MULTILATERAL FINANCING THROUGH WAREHOUSE RECEIPTS OF EMERGENCY STOCKS HELD BY LDCS. THE POINT THAT BRAZILIANS HAVE MADE IS THAT, BECAUSE OF

SEASONAL DIFFERENCES, STOCKS HELD IN SOUTHERN HEMISPHERE
WOULD LIGHTEN BURDEN OF NORTHERN HEMISPHERE DEVELOPED
COUNTRY PRODUCERS. GOB HAS INDICATED A PREFERENCE FOR THE
FAO AS A FORUM FOR CONSULTATIVE EFFORTS ON FOOD PROBLEMS.
GOB WILL BE INTERESTED IN USG THINKING ON THE PROPOSED
INTERNATIONAL FUND FOR AGRICULTURAL DEVELOPMENT AND AN
INDICATION THAT BRAZIL WOULD BE ELEGIBLE BENEFICIARY.
GOB ENDORSES THE VIEW THAT THE ONLY LONG-TERM SOLUTION TO
THE WORLD FOOD PROBLEM IS INCREASED OUTPUT AND EFFICIENCY,
AND THEY WILL EMPHASIZE THAT BRAZIL'S CONTRIBUTION (FOR
WHICH THEY DESIRE ADDITIONAL EXTERNAL FINANCIAL AND
TECHNICAL HELP) WILL BE THROUGH IMPROVED DOMESTIC PRODUCTION.
CRIMMINS

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